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APPLICATION NO.	FILING DATE	FIRST NAMED INVENTOR	ATTORNEY DOCKET NO.	CONFIRMATION NO.
10/607,707	06/27/2003	Joseph Jacob Zukowski	MFCP.132805	7921

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SHOOK, HARDY & BACON L.L.P.  
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INTELLECTUAL PROPERTY DEPARTMENT  
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EXAMINER
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BONSHOCK, DENNIS G

ART UNIT	PAPER NUMBER
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2173

MAIL DATE	DELIVERY MODE
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10/31/2007

PAPER

**Please find below and/or attached an Office communication concerning this application or proceeding.**

The time period for reply, if any, is set in the attached communication.

# Office Action Summary

Application No.

10/607,707

Applicant(s)

ZUKOWSKI ET AL.

Examiner

Dennis G. Bonshock

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-- The MAILING DATE of this communication appears on the cover sheet with the correspondence address --

## Period for Reply

A SHORTENED STATUTORY PERIOD FOR REPLY IS SET TO EXPIRE 3 MONTH(S) OR THIRTY (30) DAYS, WHICHEVER IS LONGER, FROM THE MAILING DATE OF THIS COMMUNICATION.

- Extensions of time may be available under the provisions of 37 CFR 1.136(a). In no event, however, may a reply be timely filed after SIX (6) MONTHS from the mailing date of this communication.
- If NO period for reply is specified above, the maximum statutory period will apply and will expire SIX (6) MONTHS from the mailing date of this communication.
- Failure to reply within the set or extended period for reply will, by statute, cause the application to become ABANDONED (35 U.S.C. § 133). Any reply received by the Office later than three months after the mailing date of this communication, even if timely filed, may reduce any earned patent term adjustment. See 37 CFR 1.704(b).

## Status

- 1) ☒ Responsive to communication(s) filed on 14 September 2007.
- 2a) ☐ This action is **FINAL**. 2b) ☒ This action is non-final.
- 3) ☐ Since this application is in condition for allowance except for formal matters, prosecution as to the merits is closed in accordance with the practice under *Ex parte Quayle*, 1935 C.D. 11, 453 O.G. 213.

## Disposition of Claims

- 4) ☒ Claim(s) 1, 4-10, 13, 16-22 and 31-38 is/are pending in the application.
- 4a) Of the above claim(s) \_\_\_\_\_ is/are withdrawn from consideration.
- 5) ☐ Claim(s) \_\_\_\_\_ is/are allowed.
- 6) ☒ Claim(s) 1, 4-10, 13, 16-22, and 31-38 is/are rejected.
- 7) ☐ Claim(s) \_\_\_\_\_ is/are objected to.
- 8) ☐ Claim(s) \_\_\_\_\_ are subject to restriction and/or election requirement.

## Application Papers

- 9) ☐ The specification is objected to by the Examiner.
- 10) ☐ The drawing(s) filed on \_\_\_\_\_ is/are: a) ☐ accepted or b) ☐ objected to by the Examiner.  
Applicant may not request that any objection to the drawing(s) be held in abeyance. See 37 CFR 1.85(a).  
Replacement drawing sheet(s) including the correction is required if the drawing(s) is objected to. See 37 CFR 1.121(d).
- 11) ☐ The oath or declaration is objected to by the Examiner. Note the attached Office Action or form PTO-152.

## Priority under 35 U.S.C. § 119

- 12) ☐ Acknowledgment is made of a claim for foreign priority under 35 U.S.C. § 119(a)-(d) or (f).
- a) ☐ All b) ☐ Some \* c) ☐ None of:
- ☐ Certified copies of the priority documents have been received.
  - ☐ Certified copies of the priority documents have been received in Application No. \_\_\_\_\_.
  - ☐ Copies of the certified copies of the priority documents have been received in this National Stage application from the International Bureau (PCT Rule 17.2(a)).

\* See the attached detailed Office action for a list of the certified copies not received.

## Attachment(s)

- ☒ Notice of References Cited (PTO-892)
- ☐ Notice of Draftsperson's Patent Drawing Review (PTO-948)
- ☐ Information Disclosure Statement(s) (PTO/SB/08)  
Paper No(s)/Mail Date \_\_\_\_\_
- ☐ Interview Summary (PTO-413)  
Paper No(s)/Mail Date. \_\_\_\_\_
- ☐ Notice of Informal Patent Application
- ☐ Other: \_\_\_\_\_

***Non-Final Rejection***

***Response to Amendment***

1. It is hereby acknowledged that the following papers have been received and placed on record in the file: Amendment as received on 3-14-2007.

2. Claims 1-38 have been examined.

**Status of Claims:**

3. Claims 1, 4-10, 13, 16-22, and 31-38 are rejected under 35 U.S.C. 103(a) as being unpatentable over Scherr et al, Pub. No.: US 2004/0010513 A1, hereinafter Scherr and Barnett et al., Pub. No.: US 2002/0154178, hereinafter Barnett.

4. Claims 2, 3, 11, 12, 14, 15, and 23-30 have been cancelled by the Applicant.

***Claim Rejections - 35 USC § 103***

1. The following is a quotation of 35 U.S.C. 103(a) which forms the basis for all obviousness rejections set forth in this Office action:

(a) A patent may not be obtained though the invention is not identically disclosed or described as set forth in section 102 of this title, if the differences between the subject matter sought to be patented and the prior art are such that the subject matter as a whole would have been obvious at the time the invention was made to a person having ordinary skill in the art to which said subject matter pertains. Patentability shall not be negated by the manner in which the invention was made.

2. Claims 1, 4-10, 13, 16-22, and 31-38 are rejected under 35 U.S.C. 103(a) as being unpatentable over Scherr et al, Pub. No.: US 2004/0010513 A1, hereinafter Scherr and Barnett et al., Pub. No.: US 2002/0154178, hereinafter Barnett.

3. With regard to claim 1, which teaches a method for enabling a user to organize a project, comprising the steps of: displaying an integral user environment to a user to

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enable access of information pertinent to the project from within the integral user environment; receiving a list of to do items that are displayed within the integral user environment, wherein the to do items are reminders created by the user to take certain actions, Scherr teaches, in paragraphs 22-25 and in figure 1, a system for allowing a user to organize a project into a concern cascade, the cascade having a plurality of levels of concerns ranging from primary Areas of Concern (AoC) to sub-Areas of Concern displayed to the user, in order to show a user what still needs to be done (to-do) (see paragraph 19). With regard to claim 1, further teaching enabling the user to associate an entity with a single to do item selected from the list of to do items; and enabling a user to access said entity that is thus associated with the selected to do item, from within the integral user environment, Scherr further teaches, in paragraphs 35 and 42, allowing a user to associate documents (messages, word processing documents, spreadsheets, web pages, data bases, presentations, and the like), with select AoC, sub-AoC, concern, outcome, commitment and/or occasion, and further enabling a user to link to associated documents from within the concern cascade. With regard to claim 1, which further teaches wherein enabling the user to associate the entity comprises: displaying a plurality of categories of entities from which the user can select, within the integral user environment, wherein the plurality of categories of entities includes at least one member of a group comprising a Web link, a tasks, a template, and a document; in response to the user selecting one of the categories, displaying alternative choices of entities from which the user can select for association with the single to-do item selected from the list; and in response to one of the plurality of alternative choices being

selected, providing an indication that said one of the plurality of alternative choices is associated with the single to do item selected from the list, Scherr teaches associating elements from varying categories (messages, word processing documents, spreadsheets, web pages, etc.) with specific concerns in a list of concerns, and providing a visual links to the documents via the UI (see paragraphs 35 and 42), but doesn't specifically teach displaying a plurality of categories of entities for association with items in the list.

Barnett a system for associating entities (e.g. web content) with a users calendar/to-do list (see paragraphs 6, 20, and 92), similar to that of Scherr, but further teaches displaying a plurality of categories available for user selection (see paragraph 96), where upon user selection the user is provided with a list of entities specific to the selected category (see paragraph 97), that are available for user selection to be associated (added to) the to-do list / calendar (see paragraph 98). It would have been obvious to one of ordinary skill in the art, having the teachings of Scherr and Barnett before him at the time the invention was made to modify to-do list of Scherr to include the incorporation of items in the to-do list by categorically assigned items, as did Barnett. One would have been motivated to make such a combination because Scherr describes varying categories of linked documents, where an interface to link by type would be desirable, furthermore this would provide a more organized saving of documents to associated concerns (see Scherr paragraph 42).

4. With regard to claims 4 and 32, which teach the step of automatically executing a search for relevant alternative choices of entities to display to the user, as a function of

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the to do item in the list that is currently selected, Scherr teaches, in paragraphs 36 and 42, a search being done to associate entities (messages, web pages, etc.) with concerns (automatically upon receipt).

5. With regard to claims 5 and 33, which teach further comprising the step of providing alternative choices derived from other programs that are accessible to the user, Scherr teaches, in paragraph 42, the user being able to link any document by saving it to a corresponding concern.

6. With regard to claims 6 and 34, which teach further comprising the step of including a blank entity among the plurality of choices that are displayed the user, Scherr teaches, in paragraphs 35 and 42, allowing a user to associate documents, where it would be obvious to link to blank entities. One would be motivated to do so because a blank document is just an empty document (empty word processing document).

7. With regard to claims 7, 19, and 35, which teach further comprising the step of enabling the user to enter a note in association with a currently selected to do item in the list, so that the note is displayed within the integral user environment which the user subsequently again selects said to do items in the list with which the note is associated, Scherr teaches, in paragraphs 17, and 23-25 and in figure 1, associating a note with an Area of Concern, where the notes are displayed simultaneously with the Area of Concern.

8. With regard to claims 8, 20, and 36, which teach further comprising the step of enabling the user to indicate a date for association with a currently selected to do item

in the list, Scherr teaches, in paragraphs 25, 31, and 45, along with figure 6, associating a date with and Area of Concern.

9. With regard to claims 9, 21, and 37, which teach further comprising the step of automatically scheduling the date indicated by the user within a calendar program so that a user is subsequently provided a reminder by the calendar program in regard to the date thus indicated, Scherr teaches, in paragraphs 25 and 45, and in figures 1 and 6, a calendar program that provides the user with reminders of events.

10. With regard to claims 10, 22, and 38, which teach further comprising the step of providing a plurality of defined projects, each defined project including a plurality of proposed to do items that are likely relevant to a subject matter of the defined project, Scherr teaches, in paragraphs 22-25 and in figure 1, the concern cascade having a plurality of levels of concerns ranging from primary Areas of Concern (different projects) and sub-Areas of Concern displayed to the user.

11. With regard to claim 13, which teaches a system for enabling organizing a project, comprising: a memory in which a plurality of machine instructions are stored (see paragraph 6); a display on which text and graphics are displayed (see paragraph 10 and figures 1 and 5); a user input device that enables input and selection of choices provided on the display (see paragraph 42, claim 1, and figure 5); and a processor coupled to the memory, user input device, and the display (see paragraph 40), said processor executing the plurality of machine instruction to carry out a plurality of functions, including: displaying an integral user environment to a user to enable access of information pertinent to the project from within the integral user environment;

receiving a list of to do items that are displayed within the integral user environment on the display, wherein the to do items are reminders created by the user to take certain actions, Scherr teaches, in paragraphs 22-25 and in figure 1, a system for allowing a user to organize a project into a concern cascade, the cascade having a plurality of levels of concerns ranging from primary Areas of Concern (AoC) to sub-Areas of Concern displayed to the user, in order to show a user what still needs to be done (see paragraph 19). With regard to claim 13, further teaching enabling the user to associate an entity with a single to do item selected from the list of to do items; and enabling a user to access said entity that is thus associated with the selected items, from within the integral user environment, Scherr further teaches, in paragraphs 35 and 42, allowing a user to associate documents (messages, word processing documents, spreadsheets, web pages, data bases, presentations, and the like), with select AoC, and further enabling a user to link to associated documents from within the concern cascade. With regard to claim 13, which further teaches wherein enabling the user to associate the entity comprises: presenting a plurality of categories of entities from which the user can select, within the integral user environment; wherein the plurality of categories of entities includes at least one member of a group comprising a Web link, a task, a template, and a document, in response to the user selecting one of the categories, displaying alternative choices of entities from which the user can select for association with the single to do item selected from the list; and in response to one of the plurality of alternative choices being selected, providing an indication that said one of the plurality of alternative choices is associated with the single to do item selected from the list,



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Scherr teaches associating elements from varying categories (messages, word processing documents, spreadsheets, web pages, etc.) with concerns in a list of concerns, and providing a visual links to the documents via the UI (see paragraphs 35 and 42), but doesn't specifically teach displaying a plurality of categories of entities for association with items in the list.

Barnett teaches a storage medium storing instructions (see paragraphs 66 and 67) for implementing a system for associating entities (e.g. web content) with a users calendar/to-do list (see paragraphs 6, 20, and 92), similar to that of Scherr, but further teaches displaying a plurality of categories available for user selection (see paragraph 96), where upon user selection the user is provided with a list of entities specific to the selected category (see paragraph 97), that are available for user selection to be associated (added to) the to-do list / calendar (see paragraph 98). It would have been obvious to one of ordinary skill in the art, having the teachings of Scherr and Barnett before him at the time the invention was made to modify to-do list of Scherr to include the incorporation of items in the to-do list by categorically assigned items, as did Barnett. One would have been motivated to make such a combination because Scherr describes varying categories of linked documents, where an interface to link by type would be desirable, furthermore this would provide a more organized saving of documents to associated concerns (see Scherr paragraph 42).

12. With regard to claim 16, which teaches the step of automatically executing a search for relevant alternative choices of entities to display to the user, as a function of the to do item in the list that is currently selected, Scherr teaches, in paragraphs 36 and

42, a search being done to associate entities (messages, web pages, etc.) with concerns (automatically upon receipt).

13. With regard to claim 17, which teaches further comprising the step of providing alternative choices derived from other programs that are accessible to the user, Scherr teaches, in paragraph 42, the user being able to link any document by saving it to a corresponding concern.

14. With regard to claim 18, which teaches further comprising the step of including a blank entity among the plurality of choices that are displayed the user, Scherr teaches, in paragraphs 35 and 42, allowing a user to associate documents, where it would be obvious to link to blank entities. One would be motivated to do so because a blank document is just an empty document (empty word processing document), that would provide a user with a starting point for a document.

15. With regard to claim 31, which teaches a memory medium on which are stored machine instructions (see paragraph 6) for carrying out a method for enabling a user to organize a project, comprising the steps of: displaying an integral user environment to a user to enable access of information pertinent to the project from within the integral user environment; receiving a list of to do items that are displayed within the integral user environment, wherein the to do items are reminders created by the user to take certain actions, Scherr teaches, in paragraphs 22-25 and in figure 1, a system for allowing a user to organize a project into a concern cascade, the cascade having a plurality of levels of concerns ranging from primary Areas of Concern (AoC) to sub-Areas of Concern displayed to the user, in order to show a user what still needs to be done (to-

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do) (see paragraph 19). With regard to claim 1, further teaching enabling the user to associate an entity with a single to do item selected from the list of to do items; and enabling a user to access said entity that is thus associated with the selected to do item, from within the integral user environment, Scherr further teaches, in paragraphs 35 and 42, allowing a user to associate documents (messages, word processing documents, spreadsheets, web pages, data bases, presentations, and the like), with select AoC, sub-AoC, concern, outcome, commitment and/or occasion, and further enabling a user to link to associated documents from within the concern cascade. With regard to claim 31, which further teaches wherein enabling the user to associate the entity comprises: displaying a plurality of categories of entities from which the user can select, within the integral user environment, wherein the plurality of categories of entities includes at least one member of a group comprising a Web link, a tasks, a template, and a document; in response to the user selecting one of the categories, displaying alternative choices of entities from which the user can select for association with the single to-do item selected from the list; and in response to one of the plurality of alternative choices being selected, providing an indication that said one of the plurality of alternative choices is associated with the single to do item selected from the list, Scherr teaches associating elements from varying categories (messages, word processing documents, spreadsheets, web pages, etc.) with specific concerns in a list of concerns, and providing a visual links to the documents via the UI (see paragraphs 35 and 42), but doesn't specifically teach displaying a plurality of categories of entities for association with items in the list.

Barnett teaches storing instructions (see paragraphs 66 and 67) for implementing a system for associating entities (e.g. web content) with a users calendar/to-do list (see paragraphs 6, 20, and 92), similar to that of Scherr, but further teaches displaying a plurality of categories available for user selection (see paragraph 96), where upon user selection the user is provided with a list of entities specific to the selected category (see paragraph 97), that are available for user selection to be associated (added to) the to-do list / calendar (see paragraph 98). It would have been obvious to one of ordinary skill in the art, having the teachings of Scherr and Barnett before him at the time the invention was made to modify to-do list of Scherr to include the incorporation of items in the to-do list by categorically assigned items, as did Barnett. One would have been motivated to make such a combination because Scherr describes varying categories of linked documents, where an interface to link by type would be desirable, furthermore this would provide a more organized saving of documents to associated concerns (see Scherr paragraph 42).

### ***Response to Arguments***

16. The arguments filed on 3-14-2007 have been fully considered but they are not persuasive. Reasons set forth below.

17. Applicant's arguments with respect to claims 1, 13, and 31 have been considered but are moot in view of the new ground(s) of rejection.

### ***Conclusion***

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18. Any inquiry concerning this communication or earlier communications from the examiner should be directed to Dennis G. Bonshock whose telephone number is (571) 272-4047. The examiner can normally be reached on Monday - Friday, 6:30 a.m. - 4:00 p.m.

19. If attempts to reach the examiner by telephone are unsuccessful, the examiner's supervisor, John Cabeca can be reached on (571) 272-4048. The fax phone number for the organization where this application or proceeding is assigned is 571-273-8300.

20. Information regarding the status of an application may be obtained from the Patent Application Information Retrieval (PAIR) system. Status information for published applications may be obtained from either Private PAIR or Public PAIR. Status information for unpublished applications is available through Private PAIR only. For more information about the PAIR system, see <http://pair-direct.uspto.gov>. Should you have questions on access to the Private PAIR system, contact the Electronic Business Center (EBC) at 866-217-9197 (toll-free). If you would like assistance from a USPTO Customer Service Representative or access to the automated information system, call 800-786-9199 (IN USA OR CANADA) or 571-272-1000.



10-22-07

dgb